



STATE OF INDIANA

DEPARTMENT OF ADMINISTRATION
State Travel Division
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Frequently Asked Questions (FAQ's):

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A. State Important FAQ's, Clarifications, and Reminders:

1.) Travel Coordinator/Planner Protocol:

Each agency will need to identify a Travel Coordinator and if applicable, Travel Planners who will have access to everyone within the agencies permanent profile and onetime traveler profile.

2.) Agency Travel Coordinator

An Agency Travel Coordinator is the key travel manager of the agency who reviews requests and approves travel for the agency. The Coordinator is the key liaison with the State Travel Office on State approvals. There is one Agency Travel Coordinator per agency.

3.) Frequent Traveler:

A frequent traveler is a State employee, unless otherwise advised by the State Travel Office, that travels four or more times throughout the year for State business travel.

4.) SF 823 Paperwork (i.e. "G10"):

Agencies are required to send the SF823 to the State Travel Office for approval. Upon approval, IDOA will scan the signed approval document and return it to the Agency Travel Coordinator via email to expedite the process. Agencies are not required to complete this if using the PeopleSoft Travel and Expense module.

5.) Preferred Hotel:

What are the Preferred Hotels in Indianapolis and must travelers stay in them?

The State has (3) Indianapolis-downtown preferred hotels. When visiting Indianapolis on State-business, travelers are required to utilize one of these preferred hotels before any other downtown hotel. If for any reason, these preferred hotels are not utilized, then the agency is to attach the following documentation to their travel voucher for payment, when submitting to the Auditor's Office: a.) an e-mail granting an exception from the State Travel Office; b.) supportive documentation of a conference if not hosted by the State showing the name of the hotel negotiated by the sponsor; and/or c.) e-mail confirmation from Travel Leaders showing that they booked the hotel for the traveler (this verifies that the preferred hotels were not available). Agencies are to work through Travel Leaders if the agency needs hotel room groups of (10) or more with or without additional meeting room space, hotel rooms needed with or without meeting space.

B. General Travel Important FAQ's, Clarifications, and Reminders:

1.) Hotel Reservations and Driver's License:

Is a driver's license truly required?

A driver's license is *not* required to make a hotel reservation. The hotel will ask for a Driver's License or BMV-issued ID when the traveler checks in at the hotel, and a credit card will be required if the traveler is paying for his or her stay.

2.) Potential Debit Memos:

What is a Debit Memo and how do we potentially avoid them?

A Debit Memo is an “Airline Violation.”

Potential Debit Memo Scenarios to Avoid:

- Churning Reservations-If a Traveler/Planner books a reservation for the wrong name and it has to be voided and rebooked with the same Dates/Flight Numbers and times on the same Airline, this is considered Churning and the Airline may issue a Debit Memo
- Split Tickets-If a Traveler/Planner books two one-ways for a lower fare this would be considered breaking the fare rule and the Airline could issue a Debit Memo.
- Duplicate Bookings- If a Traveler/Planner books the same person for the same Airline dates, times, etc. the Airline will cancel both reservations and could issue a Debit Memo.
- Back To Back Bookings- If a Traveler/Planner books the exact city pairs and the dates overlap for the same person to get a reduced fare, the Airline could issue Debit Memos and cancel the reservations.
- Estimates are Excluded- If a Traveler/Planner is getting an estimate but are not booking anything there is no chance they would get a Debit Memo.

C. Trip Manager Important FAQ's, Clarifications, and Reminders:

1.) Log In Information:

What is the “TM Company” and Username naming convention that I use when logging into Trip Manager?

Once the Agency Travel Coordinator receives a confirmation from Kelly Longstreth of Travel Leaders, the log in information is as follows:

a) To Access Trip Manager- Click on your Internet browser. In the address box type in:

www.tripmanager.com

b) Step One is Sign-In Screen - In order to access Trip Manager, please complete the following items:

1. Company = **INDIANA** (*this is not case sensitive*)
2. Member ID = **Member ID Naming Convention** (an example of the naming convention is “DOA-JWERNER”)
3. Password = *your personal password*. *Note:* The first time a user logs in, they should not enter a password. Instead, leave it blank and the system will prompt the user to create a password
4. Click on *Log In*.

2.) Secure Flight Information (i.e. TSA Information):

In Trip Manager, the Traveler's Personal Information ***MUST*** match the Secure Flight Information. These updates must be made on the traveler's Permanent or One-Time Traveler Profile. A minimum of the following must match:

1. Name as it appears on the Traveler's valid ID used during travel
2. Date of Birth
3. Gender

3.) Limit to Frequent Traveler Profiles:

Is there a limit to the number of frequent travelers an agency is allowed to have in Trip Manager?

Contractually, there is a specific allotment of profiles so IDOA would appreciate agencies being mindful in how they qualify who should obtain a profile. On an ongoing basis, agencies need to ensure that their profiles are warranted and IDOA will also be tracking profile counts to ensure we are within the allotment. As previously advised, agencies are to use Trip Manager when viable. As an example for qualifying if a traveler needs a profile, if a traveler only travels in-state and stays at

hotels that offer the \$89.00 + tax or less rate, then this traveler might not be a good candidate to have a Trip Manager profile.

4.) Trip paid for by different agency:

If an approved trip is being paid by a different agency than the one the traveler is a member of, which agency is books the trip?

The paying agency would make the reservations.

5.) Booking Hotel Rooms and Using Trip Manager:

Is using Trip Manager to book hotel rooms a requirement? Is it truly required for booking a flight or both?

Trip Manager should be used when viable. For out-of-state travel, Trip Manager should be used to reserve the flight/airfare and hotel. For in-state travel, Trip Manager can be used for rate shopping and booking hotels. Yet, if the agency can acquire the State maximum in-state rate of \$89.00 + tax or less, then the agency does not have to use Trip Manager and can just contact the hotel directly to reserve the room. All in all, Trip Manager should be used whenever possible. When booking a hotel, there is no cost to the State whether the agency uses Trip Manager or calls the Travel Leaders office. If the agency is paying for the hotel stay a credit card authorization needs to be faxed to the hotel with a copy of the front and back of the credit card along with a State Issued ID of the person's name on the card.

6.) Trip Manager Security for Credit Card Information:

What should travel coordinators or planners tell agency travelers if the traveler pushes back on storing personal credit cards on Trip Manager?

Travel Leaders (the State Contractor) is bound by confidentiality requirements. Additionally, the credit card information is stored in an encrypted manner.

7.) Southwest/Air Tran:

Is there a reason why Southwest/Air Tran is not showing up on Trip Manager?

Southwest/Air Tran flights are not available in Trip Manager due to "instant purchase" being the only option that they offer. However, that airline is often a much lower price and/or the only airline offering a direct flight. In consideration of this, agencies can print out the best flight estimate from the system and, if they believe Southwest/Air Tran may have a better offer, to then call Travel Leaders to obtain a quote for Southwest/Air Tran. The Travel Authorization submitted will have both estimates attached. The State Travel Office shall use the best judgment based on State policy, to approve which flight should be booked. If Southwest/Air Tran is approved, Travel Leaders will be notified by the State Travel Office and the agency will call to book the flight. Due to this process, the State will not be charged when calling Travel Leaders when specifically inquiring about Southwest/Air Tran flight costs. If the Southwest/Air Tran option is approved by the State Travel Office, then the agency would contact Travel Leaders to book the Southwest/Air Tran flight.